1 Overview

Within Egrants, we need to be able to track various documents received by ICJI that are associated with non-profit agencies. An agency is identified as being non-profit when the Agency Type is set to "Non Profit" on the Agency Details page.

Egrants allows you to identify documents associated with a non-profit agency in two ways:

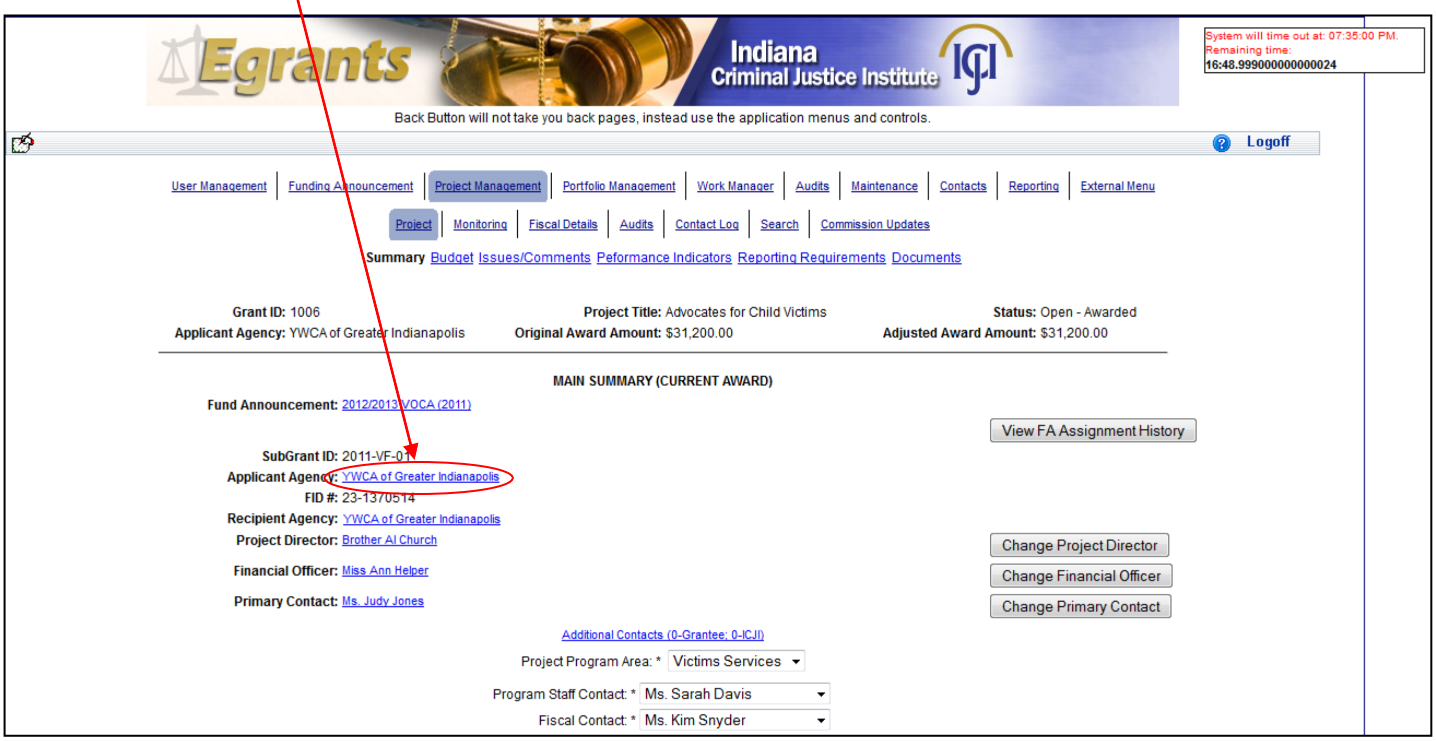
1.1 The Applicant Agency on any subgrant within Project Management can be selected to view the agency's details. The non-profit agency information may be entered and updated as described in section 2 below.

1.2 On the CONTACTS Agency Details page, the user also has the ability to enter and maintain the document information associated with the non-profit agency. The Agency Type dropdown includes an option for "Non Profit" which can only be changed within the CONTACTS Agency Details page. The agency type dropdown should be set to "Non Profit" for all non-profit agencies within CONTACTS. See section 3 below.

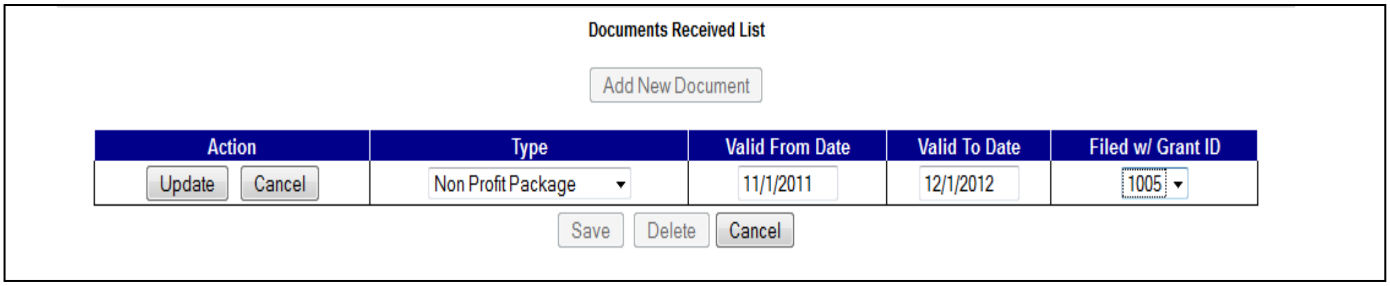
2 Verify / Update Application Agency

2.1 Navigate to the Project Management – Project or Application Main Summary page.

2.2 Click on the Applicant Agency to display the Applicant Agency Details page for the selected agency.



2.3 Scroll down to the “Documents Received List” and click the “Add New Document” button.



2.4 If the non-profit information has been reviewed and it has been determined that it is acceptable, select “Non Profit Package” from the Type dropdown and enter the Valid From and Valid To date range. The non-profit agency information is approved for that time period and the non-profit agency does not need to re-submit this information for other grants during that time period. Select the appropriate grant from the “Filed w/Grant ID” dropdown to indicate where the paperwork is filed.

2.5 Click the Update button to complete the edits to the new document added to the agency.

2.6 Additional documents may be added following this same process (steps 2.3 – 2.5).

2.7 When all documents are added, select the Save button to save the information.

3 CONTACTS – Agency Details

An agency that is non-profit must have its Agency Type set to “Non Profit” in the system. The “Non Profit” status is maintained on the CONTACTS agency detail edit page. To set the Agency Type to “Non Profit”, follow these steps:

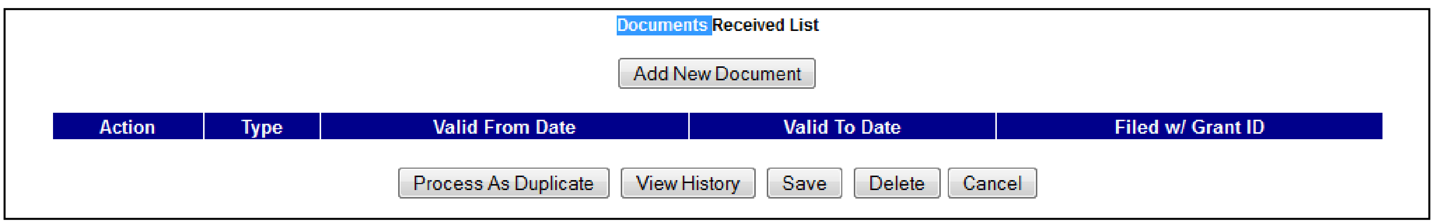
3.1 Select the CONTACTS tab and click on the Agencies link to display the Agencies Search page.

3.2 Enter search criteria necessary to find the desired agency and select the Search button.

3.3 Click on the Agency Name link on the search results to open the Agency Details page

3.4 If it’s necessary to change the Agency Type, select “Non Profit” from the Agency Type dropdown. If this is the only information to be updated, skip to the last step (3.6). If changes are also needed to the “Documents Received List’, continue with the next step (3.5).

3.5 Scroll down to the "Documents Received List" at the bottom of the Agency Details page and click the "Add New Documents" button. Follow the steps 2.4 through 2.6 above to record receipt and approval of the non-profit agency information or other documents received.



3.6 When all changes are complete, select the Save button to save the information.

4 Searching for Non-Profit Agency Information

4.1 In order to determine if a non-profit agency has submitted their non-profit agency information, go to the Applicant Agency link on the Application Main Summary page (or you can use the CONTACTS Agency Details page). Click on the link and scroll down to the bottom to see if the non-profit package has been received and reviewed. If the non-profit agency information has not been submitted or if the approval period has expired, this information must be re-submitted.

4.2 Grants Management staff normally review and approve this information. If you have any questions about the non-profit agency information, contact the fiscal contact identified on the grant application listed as the "Filed w/ Grant ID".